

Quick Reference Guide to the Employer's Technical Toolkit

(Used for building the XML files for submission to myCalPERS when using File Upload or FTP) (Last updated 07/25/2011)

Component Name	Description
Documentation for Getting Started	
Guide to the Technical Toolkit.pdf	This document describes each of the items in the toolkit and how they should be used.
Guide to myCalPERS File Readiness for Employers.pdf	This guide provides the instructions and guidelines for the development of XML files specific to Payroll, Retirement and Health transactions.
CalPERS ID Exchange File Layout.pdf	This document specifies each data element that will be included in the CalPERS ID download file.
Encryption_Decryption_File_Naming.pdf	This document describes the Encryption Decryption Service, which is designed to allow an external entity (such as an employer) to interact with CalPERS using encrypted data files.
README - Technical Toolkit.txt	Describes the purpose of the Toolkit in a plain text (txt) format.
Common Schemas/Utilities (These same two xsd files are used in for creation of all XML files received by/sent from myCalPERS)	
CommonUtilities.xsd	The CommonUtilities.xsd defines the specifications for the data elements that are common across all of the XML files used by myCalPERS (i.e. addresses, phone numbers, dates, currency amounts...).
SoapEnvelope.xsd	The SOAP Envelope schema is common across all files transmitted to CalPERS using FTP or File Upload.
Payroll	
Payroll Contribution File.pdf	This Data Element Definition (DED) provides the data element names, descriptions and business rules for building to the structure found in the Payroll Contribution XML schema.
Payroll Response File.pdf	This Data Element Definition (DED) provides the definition for the Data Elements CalPERS will return in the response file when Employers submit Payroll Contribution files using FTP.
Payroll Validations.pdf	This document provides the context of error codes that may be returned in the Payroll Response File.
PayrollRetirement_Page_1.jpg	This is a graphical representation of the structure of the Report branch of the Payroll XML file
PayrollRetirement_Page_2.jpg	This is a graphical representation of the structure of the Participant branch of the Payroll XML file
PayrollRetirement_Page_3.jpg	This is a graphical representation of the structure of the Participant Record Details branch of the Payroll XML file
Schema documentation for PayrollRetirementV1.pdf	This document provides the technical details for the PayrollRetirement.xsd.
PayrollRetirementV1.xsd	The PayrollRetirement.xsd defines the structural requirements of the Payroll Contribution.xml
20110321122800_003_10006-Sample Payroll.xml	A sample Payroll Contribution.xml file, which can be used as a reference.
20110622094200_124_10006_Sample Payroll_2.xml	A second sample Payroll Contribution.xml file, which provides an example of reporting multiple transactions in a single Participant record (showing multiple Pay Rates, multiple Special Comps and a Service Credit Purchase)
PayrollReportResponseV1.xsd	The PayrollReportResponse.xsd is defines the structure of the file CalPERS will return to Employers who submit Payroll Contributions in an XML file using sFTP.
Retirement	
Retirement Enrollment File.pdf	This Data Element Definition (DED) doc defines the data elements and business rules for including the data elements in the Retirement Enrollment XML file specific for Public Agencies and Schools (except CSU). The XML containing these data elements is built to the structure found in the Retirement Enrollment schema.

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Component Name	Description
State - Retirement Enrollment File.pdf	This Data Element Definition (DED) doc defines the data elements and the business rules for including the data elements in the Retirement Enrollment XML file specific for State Agencies and CSU. The XML containing these data elements is built to the structure found in the Retirement Enrollment schema.
Retirement Enrollment Response File.pdf	This Data Element Definition (DED) defines the Data Elements CalPERS will send to Employers after processing the Retirement Enrollment data submitted through File Transfer Protocol (FTP).
State - Retirement Enrollment Response File.pdf	This Data Element Definition (DED) defines the Data Elements CalPERS will send to State agencies/representatives after processing the Retirement Enrollment data submitted through File Transfer Protocol (FTP).
Retirement Enrollment Validations.pdf	This document provides the context of the error codes that may be returned in the Retirement Enrollment Response File for Public Agencies and Schools (not CSU).
State - Retirement Enrollment Validations.pdf	This document provides the context of the error codes that may be returned in the Retirement Enrollment Response File for State agencies and CSU.
20110321122800_003_00007-Sample Retirement.xml	A sample RetirementEnrollment.xml file, which can be used as a reference, however, coding should be based on the structure defined in RetirementHealthTransactionsV1.xsd (schema) and the business rules defined in the DED for the Retirement files.
Health	
Health Enrollment File.pdf	This Data Element Definition (DED) defines the Data Elements and business rules for including the data elements in the Health Enrollment file for Public Agencies and Schools (not CSU). The XML containing these data elements is built to the structure found in the Health Enrollment schema.
State - Health Enrollment.pdf	This Data Element Definition (DED) defines the Data Elements and business rules for including the data elements in the Health Enrollment file for State Agencies and CSU. The XML containing these data elements is built to the structure found in the Health Enrollment schema.
Health Enrollment Response File.pdf	This Data Element Definition (DED) defines the Data Elements CalPERS will send to Employers after processing the Health Enrollment data submitted through File Transfer Protocol (FTP) by Employers.
State - Health Enrollment Response File.pdf	This Data Element Definition (DED) provides the definition for the Data Elements CalPERS will return to State Agencies and Schools (not CSU) when Health Enrollment files are submitted using FTP.
Health Enrollment Validations.pdf	This document provides the context for error codes that may be returned in the Health Enrollment Response files for Public Agencies and Schools (not CSU).
State - Health Enrollment Validations.pdf	This document provides the context of the error codes that may be returned in the Health Enrollment Response file for State Agencies and CSU.
20110321122800_003_50031-Sample Health.xml	A sample HealthEnrollment.xml file, which can be used as a reference, however, coding should be based on the structure defined in RetirementHealthTransactionsV1.xsd (schema) and the business rules defined in the DED for the Health files.
Schemas for creating Health and Retirement XML	
NOTE: The schemas (xsd files), listed below, are used for building both Health and Retirement XML files for Public Agencies, State agencies and Schools. You must refer to the appropriate DED, listed above, for determining which data elements are/are not included in the XML file you are creating.	
Schema Documentation for RetirementHealthTransactionsV1.pdf	This document provides technical details for the Retirement / Health Transactions schema (RetirementHealthTransactionsV1.xsd)
RetirementHealthTransactionsV1.xsd	The RetirementHealthTransactionsV1.xsd defines the structural requirements for building the Health and Retirement Enrollment.xml files
RetirementHealthResponseV1.xsd	RetirementHealthResponseV1.xsd defines the structural requirements for building the Health and Retirement Enrollment Response.xml files.
XML Validator Tool – (IMPORTANT NOTE: Please read the disclaimer in the XML Validator Setup and Usage guide prior to using this tool)	

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Component Name	Description
XmlValidationUtility.zip	This tool is provided so the XML schema can be validated for each XML file prior to submission to CalPERS. PLEASE NOTE: The XML validator tool will only validate a portion of the XML. Full validation will only occur when the file is submitted to my CalPERS
XML Validator Tool Setup and Usage.pdf	This document provides the instructions for installing and using the XML Validator Tool.